

# Prepare to Launch

Supercharge  
your year  
with a powerful  
sales kickoff





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with a powerful sales kickoff

BY PAUL NOLAN

Before founding SalesHood, a sales enablement platform company, in 2013, Elay Cohen worked for much of the early 2000s at the CRM behemoth Salesforce. He recalls meeting with Salesforce co-founder and CEO Marc Benioff to review the agenda he helped develop for an upcoming sales kickoff.

Cohen's plan included a number of breakouts over the multiple-day event for small groups to receive training, but Benioff nixed it. There is ample time before the kickoff for training and plenty of time afterward to certify salespeople on training, Cohen remembers Benioff saying. He wanted the kickoff—one of the few times during the year that the whole sales team would be together—to be about connecting, sharing successes and swapping ideas.

“I want you to use the time when we're together to motivate, inspire and get people pumped up. I want to do things in person that we can't do remotely,” Cohen recalls Benioff saying.

## Why Kickoffs Matter

“Connecting” and “motivating” are words we heard repeatedly from those we spoke with about constructing effective sales kickoffs. Other frequently mentioned concepts: “alignment,” and “celebrate.”

Sales Kickoffs (SKOs) are almost as old as sales itself. In strong economies, companies start the year by bringing their entire sales team and maybe marketing and sales support staffers to an offsite that lasts two to three days. However, in an era of tighter budgets and decreased business travel, some companies may be tempted to eliminate this annual event. That could be penny wise and pound foolish.

“Sales kickoffs are pivotal events that set the tone for the entire year,” Max Shak, founder and CEO of digital solutions company [NerdDigital](#), said in an email exchange. His key objectives for kickoffs:

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- **Alignment** – Ensure the entire sales team is aligned with the company’s overarching goals and sales strategies for the upcoming year.
- **Team building** – Foster a sense of unity and camaraderie by facilitating team-building activities and networking opportunities.
- **Motivating** – Energize the salesforce by reinforcing the value of their work and highlighting their potential to achieve targets.
- **Training** – It doesn’t need to be the focus of a kickoff, but Shak notes there should be room on the agenda for training, whether on new products, updated sales processes or the latest market trends. “You have to equip salespeople with the knowledge they need to excel,” he said.

### Make Room for Micro Discussions

Caitlin Begg helps B2B sales teams close more deals by improving their social selling skills. Her company, [Authentic Social](#), is all about helping salespeople enhance the authenticity of their business relationships in an increasingly digital business world. Sales happens less and less in person, yet Begg helps companies bring a more human touch to their business interactions.

Her company is an extension of her 2016 Harvard University sociology thesis on virtual impressions and how digital communication affects the way we interact as well as form and develop relationships. She is frequently tasked with helping clients create effective sales kickoffs.

“One thing that we like to make sure is integrated into sales kickoffs is a balance of the spectacular and the everyday,” Begg said. “There should be big talks and big things going on. Where I often see companies fail with sales kickoffs is they focus too much on the spectacular.”

So many of those we spoke with about SKOs emphasized the importance of creating numerous opportunities for informal conversations. Begg calls them “micro discussions.” They occur

#### Keep the Kickoff Going

“The sales kickoff shouldn’t just be a light switch,” said Caitlin Begg of Authentic Social. “Some companies turn it on, have the conversations and turn it off.” The kickoff creates a mindset that is sustained throughout the year. “You do some things that are more collaborative and cross-functional. When you get back to the everyday, you figure out how to create ways to make sure that everything you went over goes on every day without interrupting people’s flow and work.”

during breaks between formal presentations, over meals and any other spaces between more formal agenda items.

“This is how best practices are shared and what helps people grow,” Begg said. “Getting people together, establishing camaraderie and sharing best practices are the most important thing about sales kickoffs.”



### Use Your Technology

Sharing success stories will hopefully happen informally and throughout an SKO, but Cohen said sales leaders need to remember to use the technology that’s available to them to make sure the best strategies get circulated. His [SalesHood sales enablement platform](#) allows reps to record practice pitches or success stories from the past year. Managers can review these, rework any that need it, and incorporate them into an event’s content.

By having sales reps prep before the event, the learning starts early and the participants are more engaged once the kickoff begins. Moreover, they literally have a voice in the content that is presented.

### Inspire

SKOs set the tone for the rest of the year. Don’t overpack the agenda but do load it up with energy and inspiration – what the SalesHood SKO guide calls “bigger than you motivation.”

“A sales team can only be the best they can be if they know what success should look like – and if you make it personal to them,” the SalesHood guide states. “Communicating the difference your company makes to the lives of your customers – or the world at large – will deliver the motivation that everyone is part of something much larger. Present the big picture, then clarify each person’s role in the big picture.”

The reliance on virtual meetings during the COVID pandemic has proven difficult for many businesses to abandon. Employees want to continue working remotely while companies like the savings from drastically reduced business



## FEATURE STORY

travel. It may be tempting to shift to a virtual SKO or cancel it altogether, but doing so could send the wrong message.

Bringing a sales team together in person not only presents an opportunity to reinforce goals and processes, it's a culture-building experience.

"Getting your team away from the office really makes a difference in their perception of your investment in them," said Michael Butler, vice president of sales at [Brightspot](#), a provider of incentive programs and offsite events.

Brightspot's "The Complete Guide to Sales Kickoffs" states, "Why SKO? The message you are sending your sales team when you make the important decision to bring them all together for sales kickoff meeting is, 'You are important. We care about your needs and we are committed to your success.' This is the very first point we make, because culture is arguably the most important, but by far not the only good reason.

### Resist the Temptation to Go Virtual

Scott Fristachi, a sales leader for Extu who works from his Long Island home office, is indicative of today's remote work force. "I miss the buzz of a 'bullpen.' I miss the camaraderie and the people next to you high-fiving and hearing about what they're accomplishing.

"If a company has the budget to hold an SKO in person, 100 out of 100 times they should do it in person. There are just things you can do in person that you can't do virtually."

### Celebrate

Kickoffs should set the tone for the rest of the year and establish overarching goals, but there should be room on the agenda for celebrating past successes as well. The feel of an SKO is decidedly different than a President's Club incentive travel event, which brings only the top performers together. However, a kickoff can be a great time to call out the most recent President's Club winners and announce this year's incentive program.

Butler recalls a client of theirs who ended an SKO by announcing a first-quarter incentive program that awarded three-year leases for Porsche sports cars to the two reps who turned in the strongest start to the year. The vehicles were on display with their engines revving at the kickoff.

Also, having top performers share their success stories and insights with the team at the kickoff keeps them engaged and gives them a well-deserved pat on the back.

Sending attendees home with a small gift can go a long way toward driving enthusiasm and instilling loyalty. Scott Fristachi still has a scarf he was given at a sales kickoff more than a

### Prewrite Aligns and Engages DocuSign Teams

To drive both active learning and active participation at kickoff, teams at DocuSign were asked to answer two questions with a recorded video story in their SalesHood platform. Their teams responded by recording hundreds of motivational stories. Engagement was high with thousands of views and peer reviews. Goals for the year were set publicly. The virtual high-fiving of learning and sharing goals was a great way to get their teams aligned and doing the best work possible.

*Source: SalesHood Guide to the Ultimate Sales Kickoff*

## Checking Your SKO List Twice

Brightspot, a Texas-based events and incentive company, uses a checklist to help its clients cover all the bases when planning a sales kickoff. It includes the expected, such as size of budget, overall goals, audience demographics and meeting space needs. It also has some planning points that are not as obvious:

- Theme** – It's not just for prom dances. Themes can be mental hooks that tie together strategies and actionable goals. A theme can help you incorporate humor and actually increase retention of information.
- Event App** – In conjunction with SKO prework and strong pre-event communication, an event app can increase engagement and build anticipation.
- Keynote speaker** – Yes, company leaders should address the team. But a carefully selected keynote speaker can bring the right combination of motivation, inspiration and provocation.
- Location, location, location** – Going offsite emphasizes the importance of the meeting. Space needs and budget will drive a lot of the decision on location. It shouldn't be as posh as a President's Club incentive travel destination. Avoiding a site that has a lot of outside entertainment options can help minimize attendee distractions.



## FEATURE STORY

### Take the SKO on the Road

If your company's budget doesn't allow for bringing a national sales team together in one location, take your SKO on the road, advises SalesHood CEO Elay Cohen. It's a lot more affordable to bring eight to 10 key players to regional offices for a couple days and you can still achieve many of the same goals.

decade ago when he worked for the online real estate company Zillow. Fristachi is now senior director of North American sales at [Extu](#), a provider of channel marketing solutions and incentive programs.

Kickoffs are to educate, celebrate and inspire people," he said. When he was at Zillow, the company had an annual SKO in Seattle that brought more than 1,000 team members together for several days. The scarf was part of a team outing to a professional soccer game.

Alternatively, sending a follow-up token of appreciation to SKO attendees a few weeks after the event provides an opportunity to reinforce the main messages and inspire them all over again.

### Follow Up

Every SKO should be followed up with a survey of attendees. What did they like best about the event? What was missing? Are there skills they wanted more training on? Was the pre-work assignment helpful? Did they have ample time to network informally? Are there team members they would have liked to network with who were not present?

Undoubtedly, you will get comments about the choice of restaurants or the temperature of conference rooms being uncomfortable. Don't disregard those, but the bigger-picture insights that can help you make next year's SKO better are what you're after.

### Keep Key Objectives In Mind

SKOs are an important part of company alignment. They energize and align teams by bringing people together. The SalesHood SKO Guide states that agendas should be designed to motivate and to support activities that are only possible to do together as a group. Do not try to cram a year's worth of training into one week or a few days.

"People jam way too much into their agenda," says SalesHood's Cohen. "They put too much emphasis on training and not enough on the storytelling, the collaboration — the real connections that can happen in person." **SMM**

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# Why Customer Insights Are a Must for Your SKO

BY PAUL NOLAN

The voices that are featured at a sales kickoff will affect its impact and memorability. One voice that companies rarely include in an SKO agenda is their customer's. They are missing a hugely impactful opportunity, says Tim Riesterer, chief strategy officer at [Corporate Visions](#), a provider of revenue growth strategies.

Sales leaders use kickoffs to address perceived weaknesses in their sales process. They may even ask for sales reps' thoughts on why some opportunities weren't closed and what skills need to be improved.

some deals weren't closing. When they looked at buyer feedback collected with help from Corporate Visions, they discovered scores on their negotiation skills — one of eight skills measured — lagged the competition.

Armed with this previously unseen insight, the company completely restructured their upcoming sales kickoff to focus on creative negotiation skills.

Corporate Visions acquired a company early this year called Primary Intelligence that has the tools to collect these customer insights. Riesterer said he supports

## SELLERS SAY:

### Pricing

"We were too expensive."

### Features

"CXO wanted something else."  
"They wanted a feature we didn't have."

### Uncontrollable event

"The contact stopped responding."



70%  
different

## BUYERS SAY:

### Poor needs discovery and solution alignment.

A seller's inability to gain agreement on the problem statement, and then a lack of alignment between the buyer's needs and the proposed solution, are the top reasons for unforced errors when it comes to losing deals.

### No differentiation between the current approach and competitive alternatives.

Sellers struggle to present a clear distinction or compelling point of view that separates them from the buyer's other choices.

### Failure to respond promptly to buyer requests.

Seller's failure to respond to a buyer's requests for information creates the perception of a lack of interest in the buyer's business.

"FLIP THE SCRIPT ON YOUR SALES KICKOFF," CORPORATE VISIONS

The problem, Riesterer says, is that relying only on internal perspectives and assumptions leaves critical blind spots in a sales team's understanding of performance gaps. Corporate Visions stresses the importance of listening to buyers, including those that went with a different supplier. In fact, the company's guide to sales kickoffs is subtitled "Transforming Buyer Insights Into Sales Impact."

"Buyer feedback from thousands of deals shows that the reasons your sellers give for winning or losing deals are different from what your buyers say most of the time," Riesterer says. "When a seller marks a deal as lost, they tend to cite external factors like pricing or product gaps. But buyers tell a very different story, pointing to things like misaligned needs discovery, poor differentiation, and lack of interest from the rep in fulfilling requests."

A software company enlisted Corporate Visions' assistance to turn around declining win rates. Their sellers had been performing well and it wasn't clear why

the concept of engaging sales leaders in the content creation for an SKO, but companies need to be aware that even sales leaders can have misguided beliefs.

"We didn't know that reps are wrong/give different answers 50 to 70% of the time regarding why they win or lose when you compare it to feedback from customers," Riesterer said in an email exchange. "Our tune is evolving to saying that customer feedback is the most trustworthy source when you get enough of it at scale. Sharing insights gathered from the previous year in aggregate and showcasing certain deals as examples may be the more accurate way to do it."

According to the Corporate Visions kickoff guide, when a kickoff directly addresses buyer-identified skill gaps, the training resonates more. Sellers become invested because they see the tangible impact these skills have on deals. And when sellers feel the relevance, it boosts adoption of the new techniques.



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# A Goal Without a Plan Is Just a Wish

## Why a strategic plan ensures best practices within the direct selling industry

BY DANIELA ORTIZ, GLOBAL CHIEF MARKETING OFFICER AT HY CITE

The early 20th century French poet and writer Antoine de Saint-Exupéry provided the headline for this article. In the world of direct selling, implementing a strategic sales plan is a best practice that helps executives set priorities and ensure that employees, entrepreneurs and independent distributors are working towards the same goal. Direct selling, also known as multi-level marketing, is a thriving industry. However, organizations will be vulnerable to challenges that may arise without a resilient plan in place.

Planning ahead offers a sense of direction for executives to outline measurable goals while also using it as an evaluation tool to track success. It allows everyone within the organization, from top to bottom, to lay out critical goals for the future and work out a plan to achieve them in time.

### Key Elements of a Strategic Sales Plan

There are vital elements that direct selling executives should consider when building a strategic sales plan. These elements ensure that business plans are resilient and risk-proof while supporting the organization's overall growth.

- **Customer-Centric** – In direct selling, understanding the customer's needs is particularly crucial. Dating back to the 1700s, direct selling is one of the [oldest business models](#) in marketing. Its person-to-person retail nature demands that these organizations develop a network of entrepreneurs and independent distributors that are well aligned with the company's vision and culture so that they can interact with customers daily, carrying out best practices that help retain satisfied customers, increase referrals and support sales.

Creating a customer-centric plan enables direct sales organizations to stay true to their customers' opinions, preferences and needs, addressing customers' issues or concerns even before they arise. At Hy Cite, while we reshape the direct selling landscape, we have fortified our Client Experience division to better support both distributors and customers. This enhancement is led by a seasoned and rejuvenated leadership team. Additionally, we've elevated our consumer insight collection by adopting innovative processes and technology, forging vendor



partnerships, and conducting comprehensive research and focus groups.

- **Innovation** – As the direct selling industry evolves, organizations in this business should too. To stay ahead of the curve, executives need to embrace innovative ideas. At a time when technologies are taking many industries by storm, direct selling executives must think creatively and start figuring out ways to integrate new technologies into their business model, enhancing the distributor-consumer and the product-consumer experience, and being able to meet and exceed company goals. Supporting distributors by allowing them to expedite orders by using the company portal or mobile app are ways technology is being integrated into the model to change both the distributor and customer experience for the better. At Hy Cite, we are undergoing digital transformation to enhance our client services. While this transformation brings numerous advantages, it also presents change management challenges. Concurrently, this shift has amplified our



product ideation and innovation, fast-tracking the introduction of new products to the market.

- **Prepare for the Unknown** – When building a strategic sales plan for the year, it is important to consider the changing environment and unprecedented events that might take place. Executives should be ready to pivot and activate a continuity plan should anything go array.

According to a United States Census Bureau survey, the 2020 pandemic had a major impact on business operations such as payroll and capital expenditures. Yet, for the direct sale industry, particularly for companies focused on well-being, homecare and similar products, we saw a significant increase in prospective distributors, with people looking for alternative income sources and being their own bosses. Still, direct sale organizations faced important supply challenges and increased production and shipping costs, affecting their global bottom line. Being able to move quickly and course-correct as needed depending on external factors and other elements is an integral part of a strategic plan for the business's short- and long-term sustainability.

## Creating a customer-centric plan enables direct sales organizations to stay true to their customers' opinions, preferences and needs, addressing customers' issues or concerns even before they arise.

### Additional Best Practices

Preparing a sales plan for the upcoming year is considered good practice and a great example of leadership. In addition to strategic sales plans, other best practices are highly recommended within the direct selling industry, including protecting and enhancing the company's reputation, promoting the organization's core values internally and externally, and connecting with other industry peers.

When implementing ways to safeguard your company's reputation, creating the best experience for the customer should always be a priority. Community engagement, philanthropic endeavors and investments, and a solid corporate affairs strategy are great ways to protect and enhance the brand's reputation. However, a consistent five-star customer experience is critical to not only boosting the company's reputation but to increasing retention rates among all employees, entrepreneurs and independent distributors, and customers.

At Hy Cite, as part of our core values and key strategic actions, we promote integrity and honesty in everything we do.

This allows employees and distributors to live and breathe these values and, in turn, to demonstrate them in every single customer interaction, which yields strong results in terms of sales, customer satisfaction and repeat orders.

Lastly, connecting with industry peers and other professional groups, such as the Chamber of Commerce or the Direct Selling Association, can provide the tools to stay abreast of industry trends and ensure we keep up with the industry's best practices and most innovative approaches.

### Direct Selling: The Way It's Meant to Be

Planning for the year ahead, executives must ensure that their forecast of how the year will play out is aligned with company goals. Implementing a way to evaluate and track success will help organizations understand and recognize progress and areas of improvement to determine if a pivot in strategy is needed. At Hy Cite, our roadmap for success is built on two foundational pillars:

- Championing our distributors' achievements and equipping them with the means to amass wealth.
- Upholding customer satisfaction with a standout product lineup enriched by bespoke services.

This is why we are relentless about helping our distributors be focused on nurturing customer relationships while we provide the essential tools for their success, including inventory management, financing, training and top-tier products. This approach is vital for excelling in the direct selling model, constantly balancing invested effort and resultant earnings, allowing us to continue bringing forward top-quality, innovative products that respond to customers' needs, wants and preferences in an ever-changing world.

Planning, promoting the organization's core values, protecting and enhancing its reputation, and connecting with other industry peers are best practices that have proven to be tried and true within the industry. At Hy Cite, a global company with a history of over 60 years in the direct selling industry, these best practices have allowed the organization to thrive with its employees, entrepreneurs, independent distributors and customers across markets in Latin America and the U.S.

All in all, a direct sales company's legacy is built daily with good practices. By going about direct selling the way it's meant to be, the industry will be able to reach its full potential.

Daniela Ortiz is Global Chief Marketing Officer at Hy Cite. Founded in 1959 by Peter O. Johnson, Madison-based Hy Cite has become one of the leaders and innovators in direct sales and marketing.



For more information about Hy Cite, visit <https://hycite.com/>.



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# What Others Are Saying About Sales Kickoffs



Here's what sales leaders from a wide range of industries shared with us what they feel are the most important objectives and characteristics of sales kickoffs.

## Motivate and Engage

*“The goal of sales kickoff is to re-energize your frontline sales team and empower them to handle future activities. A good sales kickoff works as a motivator for teams to focus and improve productivity to have the best sales year.”*

*“An existing and experienced sales team might have added value to your company's performance. To further this bond and keep them engaged, you can highlight their achievements during the sales kickoff. This makes them feel valued in your company and empowers them to supervise key sales tasks.”*

– **Elisa Bender, co-founder, [RevenueGeeks](#)**

## Clarity About Objectives and Training

*“The essence of successful SKOs is to provide value that the sales team didn't have before. It's essential to focus on specific behaviors and skills that need improvement, such as the discovery of opportunities and closing ratios, rather than just reviewing numbers and announcing new products.”*

*“Post-SKO, it's imperative to have someone in the organization own the coaching aspect to ensure the continuity of learning and improvement. Incorporating real-call coaching, debriefing and feedback into the routine can significantly impact the success of the sales team.”*

– **Michael Schaffer, CEO, [Echo Factory](#)**

## Post-Event Strategies

*“The momentum generated during the kickoff should translate into tangible actions or the session is just basically a social gathering:*

**Action Plans** – Team members should leave with clear and personal objectives, strategies and an invigorated energy to implement the insights and strategies discussed.

**Follow-Up Sessions** – Scheduling follow-up meetings to evaluate the implementation of strategies, celebrating successes, and recalibrating actions if needed.

**Continuous Feedback Loop** – Implement a system where feedback is not just a one-off but a continual process, ensuring the strategies and actions remain relevant and effective.

– **Clare Jones, global outreach manager, [Custom Neon](#)**

## Turns Vets into Mentors

*“Engaging veterans involves more than recognition; it's about making them co-creators of success. Experienced salespeople can be turned into mentors, nurturing the next generation and fostering a culture of continuous improvement. Traditional belief suggests intensive training is key, but it's the quality, not the quantity, that matters.”*

– **Grace Backer, founder, [All Things Gardener](#)**

## TOP 10 BENEFITS OF HOSTING A SKO

1. Focusing on the **goals** for the year
2. Gaining **buy-in** and ensuring that everyone is on the same train, heading in the **same direction**
3. Offering **fresh perspectives** on your products/services
4. Hearing **directly** from your prospects/customers
5. Sharing **best practices**
6. Recognizing exceptional **team members** (while creating the sense of **competition** salespeople thrive under)
7. Developing new **skills**
8. Building a sense of **unity** among your sales team & other key players
9. Being face to face **bonds** in an age of chats, video calls and virtual meetings
10. Renewing and **reenergizing** your players



“THE COMPLETE GUIDE TO SALES KICKOFFS,” BRIGHTSPOT

# Strategies for Smarter Territory Planning in 2024

BY JIM RICH, AREA GENERAL MANAGER  
NORTH AMERICA, BOARD INTERNATIONAL

Optimizing your sales team's territory planning used to be a major problem for businesses globally. However, with the latest tools and trends, you can transform this challenge into a powerful asset for your sales force. Territory planning can be a genuine opportunity to redefine your sales strategy and energize your team.

## Traditional territory mapping methods are no longer effective.

Having worked in the industry for more than two decades, I can address challenges around this with a wealth of experience. In years past, most sales leaders would find themselves drawing boundaries of their territories in a manual process. The result of this would lead to disparities that caused reps to be swamped with accounts and struggling to meet quotas. That's missed opportunities, high turnover and frustration for all.

Performance visualization reveals this problematic trend for sales teams: an inverted bell curve. In an ideal scenario, we'd expect a typical bell-shaped curve, but that's not the reality. Most teams experience a high number of outliers. There's a select group of salespeople exceeding quotas, while another group falls short. And only a few in the middle.

Trying to diagnose the cause is a challenge. Could be an ill-conceived compensation plan. Could be inefficient target marketing. Some claim that corporate culture plays a factor. But the bottom line is there's a decent chance poor territory mapping is a key culprit, and it results in excess costs and higher attrition rates.

Why not distribute territories equally? It's not a straightforward task. Territory mapping is complicated and time-intensive, requiring multiple tools and a precise valuation system to ensure equitable distribution of sales opportunities. Some teams take the easy route by allocating accounts based on geographic location, but this overlooks the critical factor of account value. This is only a temporary fix for a problem that demands a more sophisticated solution.

## Position your business for *smarter* territory planning

To establish a more effective sales territory strategy, it's essential for leaders in our industry to gather a thorough dataset on customers and prospects. This data can then be used to develop a sophisticated scoring algorithm that considers factors such as customer demographics, company



characteristics, location and revenue potential. Only in using this algorithm to assess account value on an individual basis, territories can be structured in a way that ensures equal opportunities for every sales representative to build pipeline and generate revenue. This approach delivers a fair chance to excel and succeed — and I can't overstate the downstream effects on the business.

Modernizing territory planning goes beyond conventional tools like Excel and CRM systems. These tools, used by over four out of five organizations, too often lead to inefficiencies due to their limitations in visualization and scalability. A more sophisticated approach is to invest in dedicated planning software for automation and optimization. To adapt and succeed, consider these strategies:

- Expand focus beyond geography to customer segments or product lines for specialized territories.
- Leverage data more frequently to identify trends and adjust strategies to customer behavior.
- Invest in video conferencing and digital marketing for a comprehensive view of trends.
- Explore AI integration for enhanced planning and opportunities to add business value.

These strategies can help your organization improve territory planning — as well as empower your salespeople with a fair shot at success.

Jim Rich is Area General Manager North America, for Board International, a business intelligence and corporate performance management software vendor. For more information, visit [www.board.com](http://www.board.com)

